

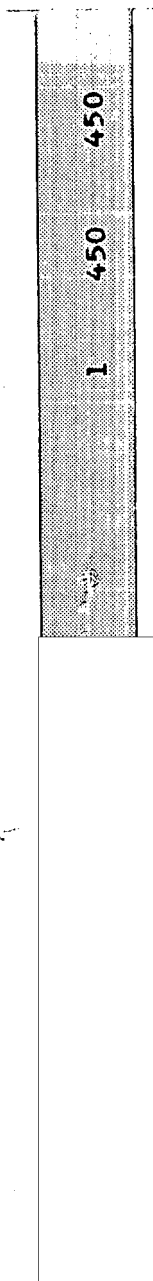
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State Dept. review completed

**Eastern Europe:
Record Grain Harvest
Little Help to Consumers**

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Key Judgments*Information available
as of 23 December 1982
was used in this report.*

The 1982 record grain harvest in Eastern Europe—estimated at some 100 million tons—represents a sizable recovery from the poor harvest of 1981 and comes as welcome news to the economically hard-pressed regimes in the area. The good harvests will permit Hungary and Yugoslavia to expand grain exports for hard currency or to barter for hard currency goods at a time when these countries are facing serious financial problems. The fact remains, however, that most of the countries—in particular, Poland and East Germany—will remain net grain importers and that the level of imports will directly affect the availability of those key foods—particularly meat—by which East Europeans measure their living standards.

Curtailment of Western credits and the regimes' consequent need to adjust to external financial constraints have limited East European grain purchases. We now estimate that Eastern Europe will import only about 7.0 to 9.0 million tons of grain in marketing year (MY) 1982/83 (July 1982 through June 1983)—54 to 70 percent of last year's total and the smallest amount since the late 1960s. Assuming that other grain suppliers are not more forthcoming with additional credits, the US share of the East European grain import market probably will remain the same as last year's, about 40 percent. Exports, however, may fall to 3.5 million tons or less compared to almost 6 million tons in MY 1981/82.

Despite this year's good harvest, the reduction in grain imports will mean that total grain consumption in MY 1982/83 in Eastern Europe will remain below the average of recent years and the shortfall will be greatest for Poland. Efforts to offset the shortfall will continue primarily to affect the livestock sectors, and Poland, East Germany, and Czechoslovakia will be particularly hard pressed in 1983 to match even this year's below-average performances in this key sector. With herd numbers stabilizing and the quality of feed rations declining, total meat output, particularly in Poland, will decline further in 1983.

The 1982 bumper harvest helped to minimize food shortages through the last quarter of 1982, though basic supply problems, particularly for meat, continued. We expect, however, that the overall food situation will worsen beginning in early 1983 as the impact of the decline in grain imports is realized and this year's harvest is rapidly absorbed into a "pipeline" emptied by last year's poor harvest. Shortages will be most acute in Poland, East Germany, and Romania, where hard currency problems are discouraging food imports and encouraging food exports.

iii

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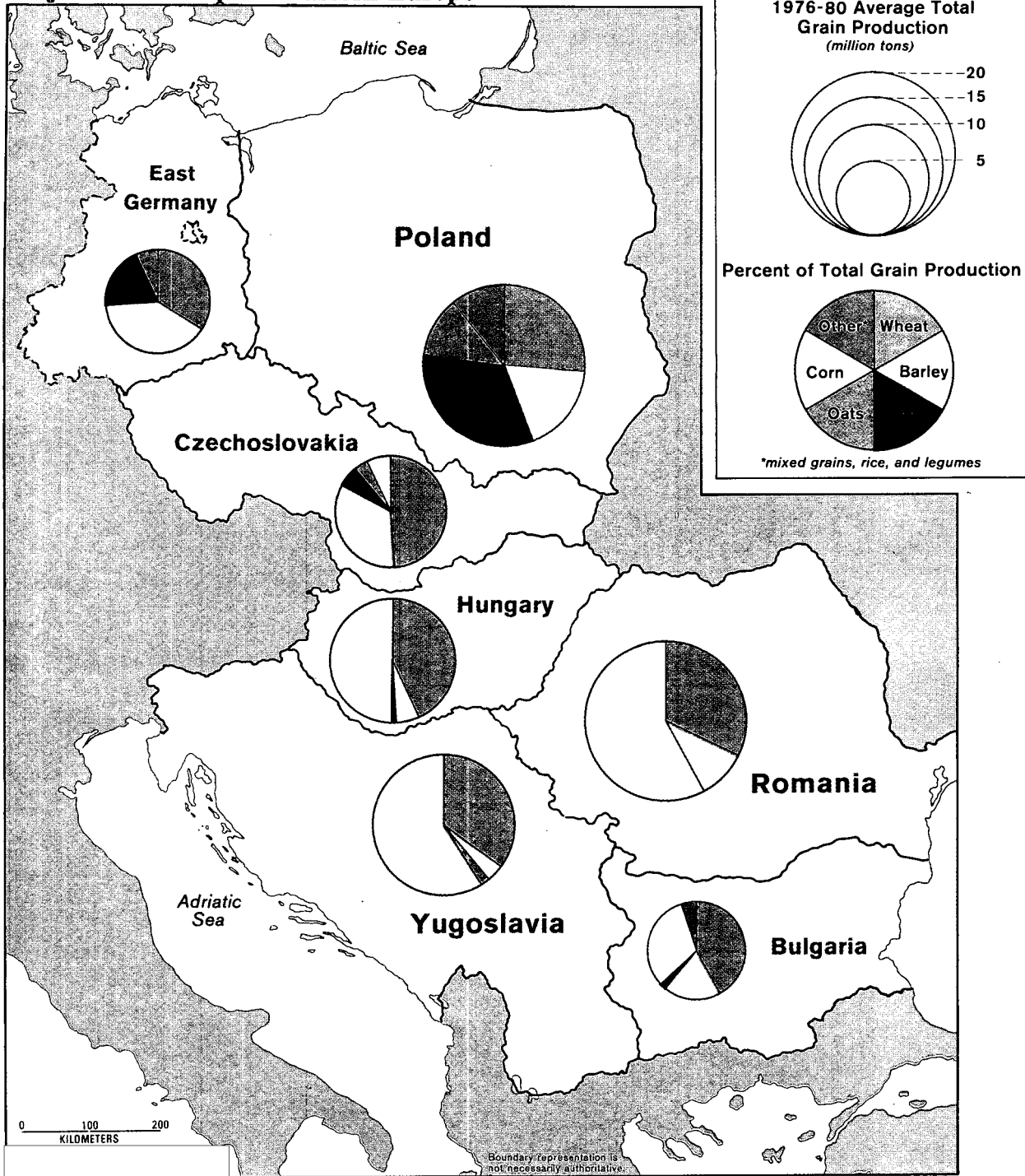
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Figure 1
Major Grain Crops in Eastern Europe



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**Eastern Europe:
Record Grain Harvest
Little Help to Consumers**

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Record Grain Harvest

We now estimate that the 1982 grain harvest in Eastern Europe totaled about 100 million tons, surpassing the record 1978 crop of 96.2 million tons and marking a sizable recovery from 1981's poor harvest of 92 million tons.¹ Record grain output was achieved in East Germany, Yugoslavia, and Hungary, above average in Poland, and average in Romania, Bulgaria, and Czechoslovakia.

Our latest estimate reflects an upward adjustment of our early August forecast. The increase was prompted by several factors:

- Harvest data for East Germany, Poland, and Romania indicate that the production of small grains—wheat, rye, barley, and oats—was slightly better than previously anticipated.²
- Excellent weather during the harvest kept seasonal losses of small grains well below normal, especially in Czechoslovakia and Poland.
- Ideal growing conditions after July in Czechoslovakia, Bulgaria, Hungary, Romania, and Yugoslavia improved prospects for the corn crop. On average, corn accounts for about a third of total East European grain production.

¹ Production statistics for Eastern Europe are given on a calendar-year basis. Trade and utilization data are given on a marketing-year basis, 1 July to 30 June. Unless otherwise stated, all years referred to in this paper are calendar years.

Weather conditions last spring and summer in Eastern Europe were generally good. A three-week drought which began in mid-May caused slight to moderate crop stress throughout the region and modestly reduced potential yields. However, greater-than-normal rainfall from mid-June to the end of July replenished soil moisture reserves, enabling the crops to make a substantial recovery. From early August the weather was good to excellent. Alternating periods of rainfall and sunshine combined with warm temperatures to permit the harvesting of small grains at a rapid pace and aided development of the corn crop. The weather remained favorable through November and the corn harvest was completed successfully.

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Poland. In December Poland's Minister of Agriculture announced a bumper grain harvest of 21.2 million tons, 10 percent above the average of the past five years and more than a million tons higher than last year. The increase was due principally to favorable weather and to the sowing of the largest area to grain since 1977—about 8 million hectares. Moreover, the entire winter grain crop—which normally accounts for about 60 percent of total Polish grain production—and about 70 percent of the spring grain crop were sown within the optimum planting periods. Polish press reports indicate that the harvest progressed rapidly and was completed in early September, about two weeks earlier than normal. Preliminary grain yields reported by the Ministry of Agriculture have been consistently higher than those achieved last year.

East Germany. In mid-September, party and state leader Honecker announced a record grain crop of some 10 million tons, compared with last year's average harvest of about 8.9 million tons. We estimate that East Germany's winter grain crop, which

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Table 1
Grain Production in Eastern Europe ^a

Million tons

	1976-80 Average	1977	1978	1979	1980	1981	1982 ^b
Eastern Europe	94.2	93.7	96.2	90.8	96.0	92.1	100.1
Northern countries	38.6	38.4	42.3	35.4	38.6	38.1	41.4
Czechoslovakia	10.1	10.3	11.0	9.2	10.7	9.4	10.2
East Germany	9.0	8.7	9.8	8.9	9.6	8.9	10.0
Poland	19.5	19.4	21.5	17.3	18.3	19.8	21.2
Southern countries	55.6	55.3	53.9	55.4	57.4	54.0	58.7
Bulgaria	8.1	7.8	7.7	8.5	7.8	8.7	8.2
Hungary	12.5	12.3	13.3	12.0	13.8	12.6	14.3
Romania	19.4	18.6	19.0	19.3	20.2	17.5 ^c	19.5
Yugoslavia	15.6	16.6	13.9	15.6	15.6	15.2	16.7

^a Grains include wheat, rye, barley, oats, corn, mixed grains; in the southern countries rice is also included; in Bulgaria, legumes. Production figures are for the calendar year.

^b CIA estimate.

^c Official 1981 Romanian plan fulfillment data released in February 1982 indicate a grain crop of 19.9 million tons, including a near-record corn harvest of 11.9 million tons. However, according to preliminary CEMA data released in March 1982, Romania's 1981 corn production is listed as 9.5 million tons. Ground observations by the US agricultural attache during the 1981 crop season and our analysis of 1981 weather data support the lower figure.

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usually accounts for about three-fourths of the total harvest, probably was near average despite excellent yields reported by the government. Economic plan fulfillment results for the first half of 1982 indicated that 16 percent of the winter grain acreage was lost to winterkill, compared with normal winterkill losses of about 2 percent. The spring grain harvest, on the other hand, most likely set a new record, the result of a record sown area and generally good weather during the critical flowering and ripening periods.

Czechoslovakia. Czechoslovakia reported in November that grain production reached 10.2 million tons, slightly below Prague's target of 11 million tons, but near average. The 1982 crop season got off to a poor start when the early onset of winter brought the winter grain sowing campaign to a premature close. Although most of the areas left unseeded were sown in the spring with lower yielding barley, the total

grain area for the year was the second smallest in a decade. Excellent weather after mid-August kept harvest losses well below normal and fostered development of the corn crop, which the US Agricultural Counselor in Prague estimated in October at a record 1.1 million tons.

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Hungary and Yugoslavia. In Hungary and Yugoslavia, grain production efforts were more successful. On the bases of official data we expect record harvests of 14.3 million tons in Hungary and 16.7 million tons in Yugoslavia, following average crops in 1981. The production of winter grains—mainly wheat—probably increased markedly from the previous year's poor showing in both countries. Aided by excellent weather in the fall of 1981, farmers in

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Yugoslavia planted wheat on an area nearly 13 percent larger than in 1980, while in Hungary acreage was expanded by some 15 percent. Yugoslavia's Federal Statistical Institute made a final wheat production estimate of 5.2 million tons, a substantial recovery from the wheat crop of 4.3 million tons in 1981.

In November, Yugoslav officials reported a corn crop of 10.5 million tons, surpassing the 1979 record of 10.1 million tons. Favorable fall weather enabled Hungary to achieve a record corn harvest of 7.5 million tons despite a smaller-than-normal harvested area.

Bulgaria and Romania. We estimate that grain production in Bulgaria will decline from last year's near-record output of 8.7 million tons, to an average crop of approximately 8.2 million tons; our estimate is based on a bumper wheat crop and an at-least-average corn harvest. In Romania, while we expect a substantial recovery from the poor 1981 crop, a likely harvest of 19.5 million tons would only equal the average annual output achieved between 1977 and 1981 and would fall well short of the official target of 24 million tons. Although Romania's output of small grains (about two-fifths of total grain production) probably was somewhat above average, a less favorable corn harvest is expected to keep total production at an average level. In late August, President Ceausescu stated that the 1982 production of wheat—Romania's most important small grain—was about 6 million tons, compared to the recent five-year average of 5.9 million tons. Yields of both wheat and barley were cut by hot, dry weather in May and June, but the barley crop, due to an expansion of the sown area, was excellent.

A Decline in Grain Imports

We estimate that Eastern Europe will import only about 7.0 to 9.0 million tons of grain in the marketing year (MY) 1982/83—about 54 to 70 percent of last year's total and the smallest amount since the late 1960s. While this year's record grain harvest will

Outlook for 1983 Grains

The warm, sunny weather that aided the 1982 harvest continued during the fall sowing campaign. Winter grains were sown on schedule and adequate rainfall fostered emergence, except in Poland where three months of dry weather threatened the crop's development. According to press reports, Polish farmers delayed sowing while waiting for rain, and the hard, dry ground made fieldwork slow and difficult. The final area sown was 12 percent less than planned.

Some reduction in winter grain yields is therefore likely, and favorable weather during dormancy and next spring will be needed to hold losses to a minimum.

decrease grain import needs, difficulties in arranging financing for grain purchases and concern over indebtedness to the West will be the key factors limiting East European grain purchases. Many East European leaderships see reductions in hard currency grain imports as a step that they can take that will ease their financial problems without damaging their economies. As a result, most governments have pledged to eliminate or sharply reduce grain imports over the next few years.

We estimate that the US share of the East European grain import market probably will remain near the level of MY 1981/82, about 40 percent; total US exports, however, could fall to about 3.5 million tons or less compared to almost 6 million tons last year. This estimate is based on the assumption that other grain suppliers are not more forthcoming with additional grain credits. Compared to MY 1981/82, US exports to each of the East European countries are expected to be less in MY 1982/83. We estimate that the largest declines will occur in sales to East Germany (down approximately 900,000 tons), Poland (off about 600,000 tons), and Czechoslovakia (down roughly 400,000 tons).

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Table 2
East European Grain Imports ^a

	Average 1977-81	1981/82 ^b	Estimate ^c 1982/83
Eastern Europe, total	15.03	12.97	7.0-9.0
Northern countries	11.41	9.30	5.2-6.5
Czechoslovakia	1.28	1.35	0.7-1.0
East Germany	3.27	3.20	1.5-2.0
Poland	6.86	4.75	3.0-3.5
Southern countries	3.62	3.67	1.8-2.5
Bulgaria	0.75	0.73	0.4-0.5
Hungary	0.19	0.12	0.1-0.2
Romania	1.65	1.38	0.8-1.1
Yugoslavia	1.03	1.44	0.5-0.7

^a 1 July to 30 June marketing year.

^b Preliminary.

^c CIA's estimate is based on our projection of the countries' ability to finance grain purchases.

We estimate that *Poland* will cut grain imports to 3.0 to 3.5 million tons—about 30 percent less than last year's total imports and probably about a million tons less than necessary to keep livestock numbers at June 1982 levels. We recently revised the import number upward [redacted]

According to press reports, Warsaw may import about 500,000 tons of grain from the USSR and Eastern Europe and will have to buy the remainder from the West. France, which provided financing for a total of 1.2 million tons of grain in 1981/82, has not renewed grain credits for 1982/83, because of Poland's inability to pay its debts. The United States, traditionally the supplier of more than half of Polish grain imports, is maintaining the restrictions imposed on Commodity

Credit Corporation (CCC) grain credits when martial law was introduced. Sales for cash, however, are permitted. [redacted]

If [redacted] the USSR and other East European countries sell as much grain to Poland as expected, an additional 1.0 to 1.5 million tons would still have to be obtained through barter or purchased for hard currency. In the marketing year ending in June 1982, the regime bartered 60,000 tons of high-quality meat for 400,000 tons of corn and some low-quality meat from Western sources. The Poles have some limited sources of hard currency to purchase grain. [redacted]

[redacted] the Polish press has reported that the regime planned to buy about 134,000 tons of grain worth \$15 million in the last quarter of 1982 with the proceeds of sales from hard currency stores. [redacted]

We estimate that *East Germany* will import 1.5 to 2.0 million tons of grain in 1982/83—about half of last year's total. Party leader Honecker has pledged to keep grain imports to a minimum this year because of hard currency problems. [redacted]

With most Western banks reluctant to grant it credit, East Germany is expected to make greater use of the interest-free "swing" credits to finance purchases of West German grain.³ Press reports indicate that East Germany purchased some grain under this arrangement in the first six months of 1982. Last year, the regime reportedly obtained some corn from the West by swapping fertilizer, and it might be able to do so again in MY 1982/83. [redacted]

³ The "swing" credit is an interest-free overdraft credit facility for the East German State Bank maintained by the West German Bundesbank for financing imbalances in intra-German trade. The ceiling on the credit was \$365 million in 1982. [redacted]

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We estimate that *Romania* will import 0.8 to 1.1 million tons of grain this year—about 30 percent less than last year. The Ceausescu regime has not been able to secure credits for grain purchases and will have to use cash or resort to barter. Similarly, we expect *Czechoslovakia* to import only 0.7 to 1.0 million tons of grain—a third less than last year. The Husak regime, [] has vowed to hold down grain imports, even though the country probably could get credits from the West. According to the US Embassy in Prague, *Romania* has already supplied *Czechoslovakia* with about 100,000 tons of grain, *Hungary* about 150,000, and *Yugoslavia* about 50,000. Additional purchases from these countries are possible, with the remainder most likely to be purchased in the West. The US share of the *Czechoslovak* grain import market—about 50 percent of the total last year—is expected to fall sharply. []

We expect *Yugoslavia*, with a better harvest this year, to import only 0.5 to 0.7 million tons of grain in 1982/83, about half of last year's total. The regime could have trouble obtaining credit for even this small amount because of *Yugoslavia*'s poor financial situation. The government has already cut agricultural imports this year because of the credit squeeze. *Yugoslavia* recently inquired about CCC guaranteed credits from the United States to buy agricultural commodities, including 500,000 tons of wheat, 400,000 tons of soybeans, and 100,000 tons each of soybean meal and soybean oil. []

As in the past year, *Hungary* will import only 0.1 to 0.2 million tons of grain, while *Bulgaria* will buy 0.4 to 0.5 million tons. *Hungary* has been a net exporter of grain for the last 10 years, while *Bulgaria* imported an average of only 11 percent of its needs in the past five years. []

Table 3

East European Grain Exports ^a

	Average 1977-81	1981/82 ^b	Estimate ^c 1982/83
Eastern Europe, total	3.49	2.64	2.8-4.1
Northern countries	0.38	0.22	0.1-0.4
Czechoslovakia	0.02	0.00	0.0-0.1
East Germany	0.33	0.21	0.1-0.2
Poland	0.03	0.01	0.0-0.1
Southern countries	3.11	2.42	2.7-3.7
Bulgaria	0.49	0.75	0.6-0.8
Hungary	0.91	0.65	1.0-1.5
Romania	1.46	0.65	0.5-0.6
Yugoslavia	0.25	0.37	0.6-0.8

^a 1 July to 30 June marketing year.^b Preliminary.^c CIA Estimate.

Grain Exports

Eastern Europe's grain exports in 1982/83 are estimated at 2.8 to 4.1 million tons, about 1 million tons more than last year and near the 1977-81 average. *Hungary*, and to a considerably lesser extent, *Yugoslavia* and *Bulgaria*, will be the only net grain exporters. Due to grain composition problems, all countries, even those that are net grain importers, will export some types of grain. As usual, much of the exported grain will be traded within the region or to the Soviet Union. This year, however, a larger-than-normal share is expected to be marketed to the West. []

Hungary may export about 1.0 to 1.5 million tons of grain—about double last year's total. *Hungary* traditionally sells the bulk of its grain exports, mostly wheat, to *Czechoslovakia*, *East Germany*, and the *USSR*; this year, however, because of the large crop and cash needs, we believe *Hungary* will seek additional grain sales to the West. Similarly, *Yugoslavia*, with a record corn crop, may export 0.6 to 0.8 million tons of corn, much of it for hard currency and the

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Table 4
Eastern Europe: Estimated Grain Production
Consumption, Trade, and Implied Deficit
or Surplus, 1982/83

Million metric tons

	Production 1982	Net Imports 1982/83 ^a	Availability 1982/83 ^b	Average Consumption 1977-81 ^c	Implied Deficit Surplus 1982/83
Eastern Europe, total ^d	100.1	4.60	104.7	105.5	-0.8
Northern countries	41.4	5.60	47.0	50.2	-3.2
Czechoslovakia	10.2	0.80	11.0	11.4	-0.4
East Germany	10.0	1.60	11.6	12.4	-0.8
Poland	21.2	3.20	24.4	26.4	-2.0
Southern countries	58.7	-1.05	57.7	55.3	2.4
Bulgaria	8.2	-0.25	8.0	8.1	-0.1
Hungary	14.3	-1.10	13.2	11.9	1.3
Romania	19.5	0.40	19.9	19.4	0.5
Yugoslavia	16.7	-0.10	16.6	16.0	0.6

^a Negative net imports implies net grain exports. Figures are based on the midpoint of our estimated range of grain imports and exports as given in tables 2 and 3.

^b Availability equals production plus net imports; assumes no beginning stocks. Because the bulk of the East European grain harvest occurs between 1 July and 31 December, annual production coincides with the trade year, 1 July to 30 June. The two may thus be added to give an approximation of grain availability for a common period—MY 1 July to 30 June.

^c Calendar years for Bulgaria, Czechoslovakia, East Germany, and Hungary; July-June MY years for Poland, Romania, and Yugoslavia.

^d Totals may not add due to rounding.

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remainder in barter deals. Good harvests worldwide, however, have shrunk the number of markets. The lower international price of corn (30 percent less than last year) and wheat (14 percent less than last year) will cut into hard currency earnings. *Bulgaria* will export 0.6 to 0.8 million tons of grain, most of which, according to a senior Bulgarian official, will go to the USSR. Despite its own domestic needs, we estimate that *Romania* will export 0.5 to 0.6 million tons of grain to obtain hard currency or hard currency goods.

Grain Consumption

For Eastern Europe as a whole, this year's good harvest will offset the expected decline in grain imports, permitting total grain supplies to increase roughly 2 million tons over the depressed level of MY 1981/82. Nevertheless, total East European grain consumption in MY 1982/83 will continue below the average of recent years. The supply situation, however, varies greatly by region and country. All of the increase in Eastern Europe's grain supplies in MY 1982/83 will occur in the southern region. Indeed, we estimate that total grain availability in the

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northern countries—Poland, Czechoslovakia, and East Germany—will be even somewhat less than in MY 1981/82, as the expected decline in imports more than offsets any production gains. Likewise, total grain consumption in the northern countries will be below that of recent years, particularly in Poland, where grain supplies should be roughly 2 million tons less than the average annual amount consumed in 1977-81. In contrast, grain supplies in the southern countries, with the exception of Bulgaria, should be sufficient to permit consumption levels near the norm of recent years. []

These projections of total grain availability are based on the midpoint of our estimated range of grain imports and exports. However, even under a more optimistic set of conditions—imports at the high end of the range, exports at the lower end—grain availability for Eastern Europe as a whole would be only slightly above the 1977-81 average and supplies in the northern countries would still fall some 2.5 million tons short of the 1977-81 average. Conversely, under more pessimistic conditions—imports at the low end of estimated range, exports at the high end—the northern countries would face an estimated deficit of 4 million tons. The southern countries would maintain an implied surplus of about 1.5 million tons. []

Efforts to offset the shortfall in grain supplies caused by the decline in imports will continue to focus on the livestock sectors. On average, grain for livestock accounts for roughly two-thirds of total grain consumption in Eastern Europe. The regimes have adopted several grain-conserving measures. A slowdown has been ordered in the planned growth of livestock output and animal numbers in Poland, East Germany, Czechoslovakia, and Romania. Inventories of hogs, and to a lesser extent of poultry—since both hogs and poultry are large consumers of grain—will be cut, while the number of cattle and other ruminant animals will expand. The amount of grain in livestock feed rations will be reduced by substituting greater quantities of domestically produced roughages. The regimes may also try to cut demand for livestock products further, and hence also for feed requirements, either by tightening ration requirements or increasing retail prices for meat and dairy products. []

The impact of reduced imports will be felt less in the southern countries, normally not as dependent upon grain imports as the northern countries. Even so, tight feed supplies should prevent any significant growth in livestock numbers or output of livestock products next year. The only exception will be Hungary, where livestock output is expected to continue to expand. Hungary recently requested CCC credits from the United States to purchase soybean meal, an important protein supplement for livestock. []

The livestock sectors in Poland, East Germany, and Czechoslovakia will be hard pressed next year even to match 1982's below-average performance. This year's poor output of nongrain crops used for feed—potatoes, sugar beets, hay, and pastures—will not permit the regimes to compensate for the further cuts expected in the grain content of feed rations by substituting these feeds. The impact of this year's increased slaughtering in the northern countries will persist well into 1983. Little or no growth is expected in livestock inventories next year, and hog numbers, certainly in Poland, are expected to decline even further because of this year's heavy slaughter of breeding sows and the tight feed supply situation expected next year. []

With herd numbers stabilizing and the quality of feed rations declining, total meat output in the northern countries, particularly in Poland, will decline further in 1983. Slaughtering to reduce herd numbers has lessened the shortfall in meat production this year. Next year, with inventories already down, no such cushion will exist. []

Outlook for Food Supplies

This year's bumper harvest and distress slaughtering of livestock resulted in some short-term improvement in food supplies during the last quarter of 1982. We expect, however, that the food situation will worsen beginning in early 1983 as the impact of the decline in grain imports is realized and this year's harvest is rapidly absorbed into a "pipeline" emptied by last year's poor harvest. Food shortages will be most acute in Poland and East Germany, where hard currency

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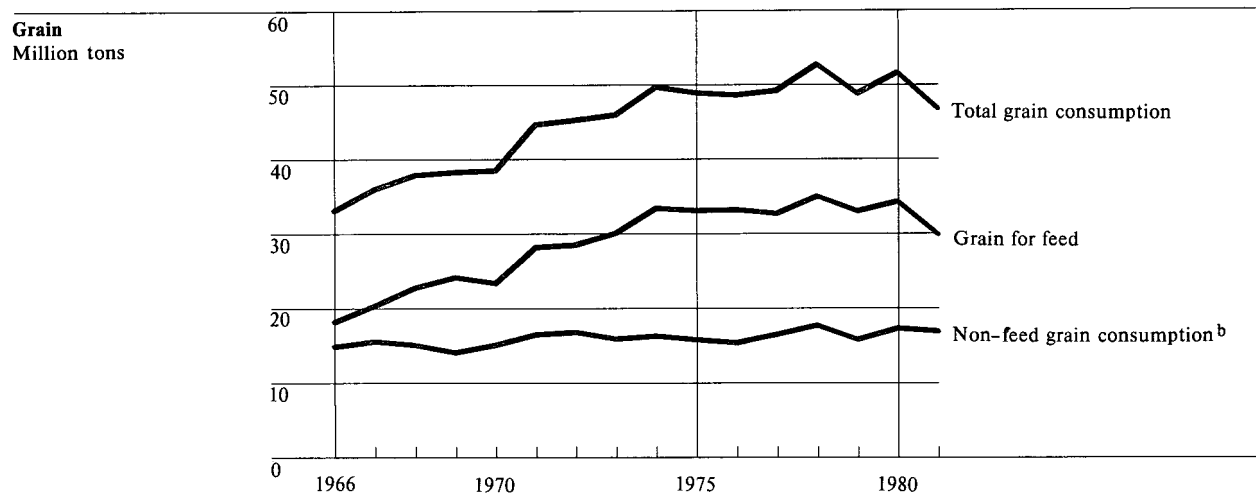
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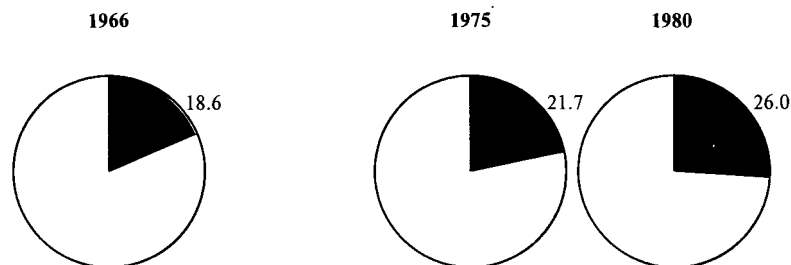
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Figure 3
Grain Imports and Grain Utilization in the
Northern East European Countries, 1966-81^a



Grain Imports as a Percent of
Total Consumption



^a Poland, East Germany, and Czechoslovakia. The countries normally account for three-fourths of total East European grain imports.

^b Includes grain for seed, industrial use, food, and dockage waste.

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problems are discouraging food imports and encouraging food exports. Even Romania, despite a grain "surplus" will face similar problems.

In *Poland*, consumers will see little or no improvement in their living standards as supplies of meat, milk, eggs, cheese, and grain products decline. The

regime was able to fulfill meat ration requirements in the last quarter of 1982 only because of the additional supplies made available by the increased slaughter of livestock, including breeding stock, and by importing

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some meat from China. Because of lower herd numbers and continuing feed shortages, meat consumption next year is expected to fall below the 1982 estimated per capita level of 55 kilograms and be well below the 74-kilogram average of 1980. Polish authorities will be hard pressed to satisfy demand for flour and other grain products because procurements from private farms have been lagging. As of late November, state grain purchases had reached only 2.47 million tons, or 49 percent of the planned 5-million-ton target. [REDACTED]

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In *Romania*, food supplies will continue to be short, despite the average harvest. The worst shortages will continue to be those of meat and dairy products. We expect the shortages will be exacerbated by the government's continued adherence to the policy of selling domestically needed food products to obtain hard currency. The *Czechoslovak* and *East German* regimes, which had pledged to reduce grain imports regardless of the size of their harvests, benefited from the improved grain production. Food supply problems, however, particularly for livestock and dairy products, will continue and may even worsen. Rumors are prevalent in *East Germany* that meat rationing may begin soon. [REDACTED]

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Appendix

Harvest of Nongrain Crops

The total East European harvest of important non-grain crops—potatoes, sugar beets, rapeseed, and sunflower seed—was poor to average in 1982. Preliminary USDA estimates indicate that the potato crop was 17 percent below the 1976-80 average, rapeseed was 10 percent less, sunflower-seed production was near average, and the sugar beet crop was slightly above average.

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In the northern countries, the harvest was poorest for potatoes (an important livestock feed—normally over 40 percent of the potato crop is fed to livestock) and rapeseed (a source of vegetable oil and oil meal). Although sugar beet output in East Germany and Poland is estimated by USDA to be down from last year, sugar production is not expected to decline as precipitously due to the higher sugar content of this year's beets. In Poland, the output of potatoes was 25 percent below average, while rapeseed was more than 30 percent below average. The lower-than-average potato crop, combined with the high prices of fodder on the free market, has contributed to recent distress slaughtering of livestock.

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In the southern countries, production of nongrain crops was mixed. Potato and sunflower-seed output was slightly below average, while sugar-beet and rapeseed production was slightly above average

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Table 5
Eastern Europe: Nongrain Production ^a

Million tons

	1976-80 Average	1980	1981	1982 Estimated ^a		1976-80 Average	1980	1981	1982 Estimated ^a
Eastern Europe					Southern countries				
Potatoes	64.99	46.12	65.10	54.06	Potatoes	8.70	7.82	8.95	8.56
Sugar beets	45.47	40.54	49.45	47.50	Sugar beets	17.19	16.11	18.59	18.70
Rapeseed	1.23	1.28	1.11	1.10	Rapeseed	0.15	0.19	0.14	0.21
Sunflower seed	1.97	1.98	2.24	1.96	Sunflower seed	1.95	1.95	2.21	1.92
Northern countries					Bulgaria				
Potatoes	56.29	38.30	57.56	45.50	Potatoes	0.37	0.30	0.41	0.37
Sugar beets	28.28	24.43	30.86	28.90	Sugar beets	1.83	1.41	1.31	1.40
Rapeseed	1.08	1.09	0.97	0.89	Rapeseed				
Sunflower seed	0.02	0.03	0.03	0.04	Sunflower seed	0.39	0.38	0.45	0.44
Czechoslovakia					Hungary				
Potatoes	3.68	2.70	3.50	3.50	Potatoes	1.19	0.94	1.13	1.15
Sugar beets	7.13	7.26	6.97	7.40	Sugar beets	3.97	3.93	4.69	4.80
Rapeseed	0.15	0.21	0.20	0.15	Rapeseed	0.08	0.10	0.06	0.10
Sunflower seed	0.02	0.03	0.03	0.04	Sunflower seed	0.30	0.45	0.62	0.55
East Germany					Romania				
Potatoes	9.87	9.21	11.50	10.00	Potatoes	4.43	4.14	4.70	4.54
Sugar beets	7.00	7.03	8.04	7.50	Sugar beets	6.13	5.56	6.45	6.50
Rapeseed	0.29	0.31	0.28	0.31	Rapeseed	0.01	0.02	0.02	0.02
Sunflower seed					Sunflower seed	0.83	0.82	0.81	0.70
Poland					Yugoslavia				
Potatoes	42.74	26.39	42.56	32.00	Potatoes	2.71	2.44	2.71	2.50
Sugar beets	14.15	10.14	15.85	14.00	Sugar beets	5.26	5.21	6.14	6.00
Rapeseed	0.64	0.57	0.49	0.43	Rapeseed	0.06	0.07	0.06	0.09
Sunflower seed					Sunflower seed	0.43	0.30	0.33	0.23

^a Preliminary USDA estimates.

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